

Recs

13 MAR 1981

MEMORANDUM FOR: Deputy Director for Administration

FROM: James H. McDonald
Director of Logistics

SUBJECT: Proposed Headquarters Consolidation Planning
Effort

1. In response to your recent tasking, this memorandum describes a planning organization and process which could be established to develop and implement a Headquarters Building construction program to consolidate the Agency on the Headquarters compound. Attachment A is an overview tutorial paper generally describing such a planning approach.

2. Since we are limited to presently available Agency resources, the planning organization (Attachment B) entitled the Building Planning Staff (BPS), would initially consist of nine directorate representatives and two Office of Logistics Program Manager representatives. Continuing efforts would be made to recruit other technical resources to supplement the BPS, and external private consultants and Architectural & Engineering (A&E) firms would also be utilized. Other internal technical and generalist support resources from each directorate would be available to contribute to such planning.

3. With respect to resources, it is not envisioned that additional positions will be available until FY-83. In the interim, we propose the BPS be manned by detailed directorate representatives, two OL Program Management representatives, and two clericals. All of these must come from existing assets. Pending the establishment of positions in FY-83, it will be necessary for OL to augment technical support to the BPS. This is based on the assumption that we can recruit to fill the seven positions we are currently understrength in OL and the three external positions we have been asked to fill. Depending on the work load, it may be actually necessary to bring employees in on a contract basis until positions are available in FY-83. As to monetary resources in FY-81, it would appear that it would not be feasible to obligate more than \$500,000 for the balance of this fiscal year. However, with this head start, we could effectively obligate an

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additional \$500,000 in FY-82 in addition to the \$1,508,000 presently in the FY-82 supplemental budget.

4. The proposed planning process assumes internal personnel resources and the availability of funding for external consultants to support their requirements development and decision-making efforts. The BPS would develop a mission, operational, and support analysis which would result in an Agency decision package for Agency Space Steering Committee (ASSC) review and policy approval. The initial planning actions, which would be taken by the BPS are listed in Attachment C.

5. Depending upon the effectiveness of the BPS, it may require some months to develop and prepare the above requirements package which would be utilized as a basis for actual engineering design. During this period of requirements planning and approval, consultant space planning firms, A&E design firms, and specialty consultants could be cleared and commissioned to assist the BPS in the preparation of environmental assessments per Environmental Protection Agency regulations, preparation of master plans for review and approval by the National Capital Planning Commission (NCPC), and required coordination with local jurisdictions and public hearings. Most important of all, such consultants would ensure that any new building represented the latest in technological advances.

6. The General Services Administration (GSA) would be a necessarily active participant with the Agency in obtaining necessary Congressional approvals and, as the likely design and construction agent for the government, in implementing this proposed project.

7. The BPS would participate with GSA to influence all aspects of Congressional approvals, design, construction and would ultimately coordinate building occupancy, transfer of building administration, and building maintenance and operation.

8. We are prepared to proceed immediately with this if the necessary personnel and funds can be provided.

[Redacted]
 /s/ James H. McDonald
 James H. McDonald

Attachment [Redacted]

PLANNING OVERVIEW PAPER

The subject of Headquarters consolidation of the Agency has been addressed in numerous studies through the years culminating in a major study in 1977 which was updated in 1980. The results of these efforts supported such a consolidation, encouraged DCI endorsement of this program, recommended establishment of a professional staff to develop a requirements package, and identified two processes (i.e., the legislative appropriations process, or the prospectus appropriations process) through which such a construction program could be congressionally approved, funded, and implemented. The absence of budgetary support for the effort, the lack of personnel resources, and the uncertainties of the political/economic environment resulted in placing the project in abeyance, and a professional planning staff was not established.

It was recently requested that if a degree of funding and in-house personnel were made available at this time, what would be the ingredients of a planning effort, what would be accomplished by a planning group, and how long would such planning take in preparation for implementing the necessary processing, approvals, design, and construction of this proposed Headquarters consolidation building program?

Primarily, such an in-house planning organization would consist of two full-time relatively senior directorate representatives from each of the four directorates, one representative from the DCI group, and two senior technical architectural/engineering representatives from OL to orchestrate the joint planning effort. Such directorate representatives should have extensive experience in and knowledge of both directorate and overall Agency organizational structure, functions, mission, and inter-relationships. They and the OL Program Managers should be given the appropriate decision-making authority to define a requirements package for senior Agency management approval and the authority to establish, access, and task other internal Agency human resources such as directorate working committees and technical support consultants for support in developing such a requirements package. This staff should also have access to private consultants, as necessary, in developing Agency requirements.

The objective of the Building Planning Staff (BPS) would be the development of a mission, operational, and support analysis. Its effort would be a programming of Agency needs and its product would be the projection and development of a specific requirements definition package which would take the form of a detailed Space Directive programming document containing a delineation of detailed organizational structure, a related listing identifying the type (i.e., office, computer, laboratory, storage, etc.) of space

enclosures for such organizational structure, the areas (i.e., size) of each space enclosure, and the numbers of Agency personnel to be housed in each space enclosure. The Space Directive would be the total Agency organizational/space requirements document and the major ingredient of the decision package to be presented to Agency senior management for policy approval prior to further technical assessment and refinement.

Under the tutelage and guidance of the OL Program Manager, each team of directorate representatives and their directorate working committees would develop a projected directorate functional posture statement of organization, mission, numbers of people, office space, and nonoffice space. Such projections could be an extension of the present organization, or, a totally new organizational structure. Then all directorate requirements projections would be integrated into an Agency overall posture.

Further joint efforts would then be made to define basic inter- and intra-directorate organizational relationships independent of the confines of facilities. With these key and approved relationships established, a determination would then be made regarding the relative juxtaposition and relocation of Agency components from external buildings and Headquarters Building to the proposed new building complex and the existing Headquarters Building.

These efforts would result in an approved strategy for eventual organizational occupancy in the Headquarters Building and the proposed new building. It would also provide a basis for determining the scope of work for design and construction to be accomplished in the existing and proposed facilities to realistically accommodate consolidation of the whole Agency at the Headquarters site, and to ensure the most efficient arrangement of Agency components to maximize performance and productivity.

During this process, the BPS may require the support of external technical consultants to help make some key determinations which would lead to its final recommendations. Its product will be the Space Directive indicating the range of specific component organizational/space requirements in their eventual office area locations in either Headquarters Building or the proposed new building. In addition, the BPS would develop economic, efficiency, morale, and life-cycle cost rationale supportive of such construction for consolidation and necessary compliance approvals. The above strategy and charter would be a statement of the proposed Agency posture to be approved as a decision package prior to further technical engineering and architectural refinement.

In the absence of existing resources to completely staff the BPS with the cross section of professional technical skills desired at this time, they should be recruited concurrently during the organizational/space requirements planning efforts of the ongoing

BPS in order to supplement their requirements definition efforts. The Space Directive product would be the structure within which such supplementary technical skills could translate such requirements into an architectural and engineering requirements package which would become a Project Directive and the point of departure for managing implementation of design and accomplishment of construction. If it is impossible to hire additional technical resources, an external architectural & engineering (A&E) firm could be cleared and commissioned to accomplish such technical survey, and compile architectural/engineering requirements in the form of a Project Directive.

During the progressive stages of planning and preparation of the Space Directive and the technical engineering Project Directive, in-process planning and coordination with the Environmental Protection Agency (EPA) on environmental matters and with the National Capital Planning Commission (NCPC) on master plan approvals would be required. The services of an A&E firm would be helpful in preparing the environmental assessments and the conceptual sketches for master plan approvals by NCPC. Such interface would require public hearings and coordination with General Services Administration (GSA) and local municipalities during, and as part of, our planning and decision-making process leading to a new building program.

In the initial planning stages, as Agency requirements are being formally identified, congressional approval and funding of a project of this magnitude would be required. The Agency would have to determine whether such approval and funding would be obtained by legislation or through the prospectus process. The nature of the political climate, the degree of control required, the desired timing of the proposed project, and the degree of success one might expect from one approach versus the other may be the basis for Agency strategy to make an appropriate selection.

Legislation for the construction of a new building would have to be prepared by the Agency and submitted to the Office of Management and Budget (OMB) at the same time as the annual budget submission. This submission would be made in accordance with OMB Circular A-19 on legislative coordination and clearance. Subsequently, this package would be coordinated with other government agencies and submitted to Congress by OMB. Congressional hearings on the legislation would be held and Agency testimony given resulting in congressional approval. Joint utilization of Agency resources, consultant resources, and GSA resources would be required to prepare such justification documentation.

Congressional approval could also be obtained through the prospectus process. The prospectus process is a procedure for obtaining congressional approval of proposed construction, alteration, or acquisition projects involving individual expenditures in excess

of \$500,000 as required by Section 7 of the Public Buildings Act of 1959 (PL 86-249, 40 U.S.C. 601), as amended (92-313). A prospectus document providing a detailed project description and analysis is submitted by the Administrator, GSA, on behalf of the Agency to Congress for approval by the Committees of Public Works of the Senate and House of Representatives. The project would then be funded either from the Federal Buildings Fund (FBF), the fund into which Standard Level User Charge (SLUC) charges are deposited, or by direct appropriation to the Agency if the Administrator, GSA and OMB so concur. Joint utilization of Agency and GSA resources would be required to develop and prepare such justification documentation.

In addition to their role in the prospectus process, GSA is responsible for the design and construction of federal facilities, and as such would play a major role in any new construction at Headquarters as they did in the construction of Headquarters Building. GSA would be called upon to certify that other government-owned or -leased space was not available.

In either of the congressional approval and funding processes, GSA could participate with the Agency in developing the necessary documentation and justifications for such approvals. The Congress could initially appropriate funding for initial studies and architectural design, and GSA could be the design and construction agent of the Federal Government responsible for hiring an architectural and engineering design firm and directing the building design. The BPS could interface with GSA and the design firm in realistically influencing the design to meet specific Agency requirements. Concurrently with above, joint efforts by GSA, the BPS, and the design firm could address the compliance interface with the Environmental Protection Agency and the National Capital Planning Commission to obtain clearances for this project.

GSA could then present conceptual designs with documentation supportive of total construction cost estimates, and clearances from EPA, NCPC and other compliance agencies to congressional committees for approval and appropriation of construction funding. The BPS could assist GSA in the development of such planning documentation and presentations. The BPS and GSA would continue to jointly control and influence detailed design by the design firm and review design drawings for final approval prior to construction contracting by GSA.

GSA could then publicly advertise for bids on the basis of detailed final working drawings and award a construction contract. GSA could be responsible for contract negotiation; contract administration; and construction inspection, monitoring, and supervision to project completion and acceptance. The BPS could monitor construction to protect Agency interests, ensure Agency requirements are being provided, provide supplemental interface

and coordination with and between contractor and GSA to resolve problems and discrepancies, and to coordinate changes as necessary.

Concurrent with the completion of the building project and beneficial occupancy, the BPS along with other OL support elements could plan and implement an occupancy action plan, coordinate a GSA assumption of maintenance and operation of the building, and make a transition of building control and administrative responsibilities to existing OL Facilities Engineering and Logistics support components in the Langley complex.

SC

SPACE COMMITTEE

DDA - Chairman

ADDA

D/L - Executive Secretary

ADDO

C/RECD

DD/NFAC

C/LSD - Technical Consultants

ADDS&T

DCI Representative

O/Compt Representative

BPS

BUILDING PLANNING STAFF

1 OL Project Manager

1 Staff Architect

DR

DIRECTORATE REPRESENTATIVES

2 DDA

2 DDO

2 NFAC

2 DDS&T

1 DCI

DWC

DIRECTORATE WORKING COMMITTEES

? - DDA - Committees = No. of Offices

? - DDO - " = No. of Area Divisions

? - NFAC - " = No. of Offices

? - DDS&T - " = No. of Offices

? - DCI - " To be determined

TSC

DDA TECHNICAL SUPPORT CONSULTANTS

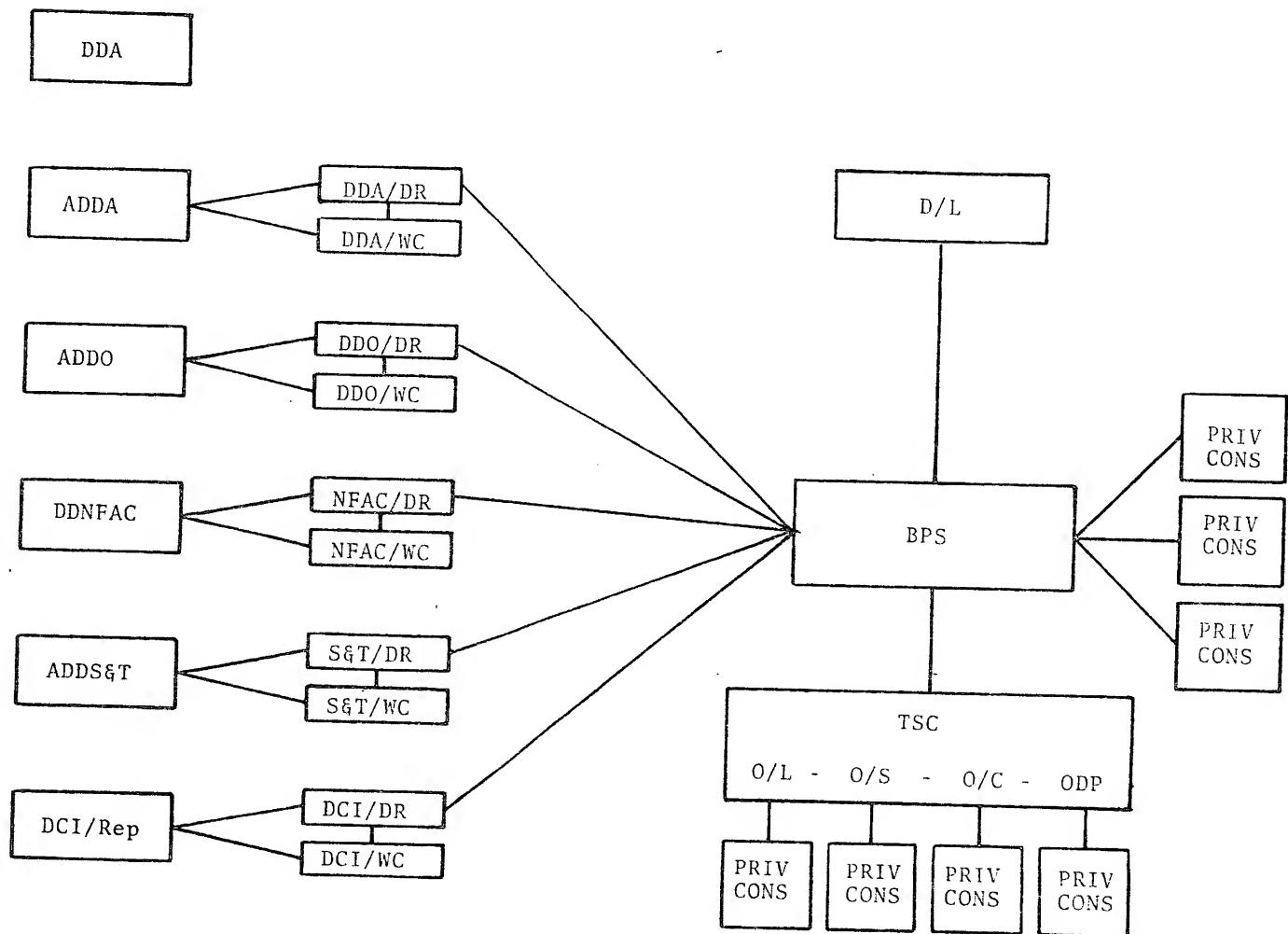
OL - OS - OC - ODP

PC

PRIVATE CONSULTANTS

Architectural-Engineering-Technical
Environmental-Systems-Specialty

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INITIAL FACILITIES PLANNING ACTIONS

Projection of Requirements Definition

1. Develop projected directorate functional posture by each directorate in terms of function, organization, mission, number of people, office space, and nonoffice space.
2. Integrate directorate functional posture projections into an overall Agency posture.
3. Establish inter- and intra-directorate organizational relationships independent of the confines of facilities.
4. Determine an approved strategy of relative juxtaposition and relocation of Agency components from, to, and between external buildings, Headquarters Building, and the new building.
5. Determine scope of work for design and construction to be accomplished in existing and proposed Headquarters facilities to accommodate approved juxtaposition of relocated facilities.
6. Develop a space requirements analysis (i.e., Space Directive) of projected Agency posture. (Analysis by Agency BPS with support from private space consultants as necessary.)
7. Develop a technical and logistics support requirements package to identify centralized support provisions to be accommodated such as communications, computer systems, security, and logistics systems. (Analysis by BPS, Agency technical resources, and external specialty consultant resources.)
8. Develop a technical engineering and architectural requirements definition of the Space Directive and the above technical and logistics support requirements package into a total Project Directive. (Analysis by BPS, Agency technical resources, external A&E, and external specialty consultant resources.)

- *9. Develop economic, efficiency, morale, life cycle cost, etc., rationale supportive of such construction for consolidation and necessary OMB compliance approvals. (Analysis by BPS, and external consultant as necessary.)
10. Preparation of conceptual and feasibility studies, coordination with EPA and NCPC, interface with local jurisdictions, and holding of public hearings to meet compliance requirements of the National Environmental Policy Act and the National Capital Planning Act. (Coordination by BPS; environmental assessment by environmental consultant; A&E preparation of Master Plan Drawings for NCPC approvals; NCPC, EPA, BPS, environmental consultants and A&E participation in public hearings.)
11. Preparation of justification documentation in support of project in congressional hearings whether legislative or prospectus process. (Development by BPS with GSA, OLC, OGC, EPA, NCPC, and consultants as necessary.)
12. Provide Agency liaison between Agency, GSA, and the GSA-commissioned A&E design firm in the development, implementation and approval of design drawings. (BPS coordination utilizing A&E and GSA expertise.)
13. Coordinate with GSA, A&E, EPA, NCPC, local jurisdictions, and public with regard to design compliance relative to environmental considerations, Master Plan approval, etc. (BPS coordination utilizing expertise of GSA, A&E, EPA, NCPC.)
14. Monitor, oversee, and coordinate GSA-awarded construction contract with GSA representatives to protect Agency interests, accommodate changes, and to influence timely project completion.
15. Initiate completed project transition to OL support elements, OL facilities engineers, and the local building manager.

* Steps 1 thru 9 represent the initial planning stage principally in FY 81 and early FY 82. The balance of steps complete the cycle thru occupancy.

